

PHILIP MORRIS U.S.A.
ALPINE
1993/1994 MEDIA RECOMMENDATION

AUGUST 16, 1993

2048410718



LEO BURNETT

PURPOSE

TO PROVIDE A 1993/1994 ALPINE MEDIA RECOMMENDATION

AGENDA

- I. BACKGROUND
- II. COMPETITIVE REVIEW
- III. MARKETING OBJECTIVES
- IV. MEDIA OBJECTIVES AND STRATEGIES
- V. PLAN RECOMMENDATION
- VI. PLAN SUMMARY
- VII. NEXT STEPS
- VIII. APPENDIX

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I. BACKGROUND

DEEP DISCOUNT SHARE HAS EXPLODED, ERODING BOTH SALEM AND ALPINE FRANCHISES

- DEEP DISCOUNT SHARE +17.1 VS. YA (28% OF MARKET SHARE)
- ALPINE SHARE - 0.2 VS. YA
- SALEM SHARE - 1.1 VS. YA

ALPINE HAS HAD VIRTUALLY NO ADVERTISING SUPPORT FOR THREE YEARS EXCEPT:

- FSI'S
- 1992 AUGUST MAGAZINES

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II. COMPETITIVE REVIEW

SALEM KEY FULL MARGIN COMPETITOR DUE TO SIMILAR MILD MENTHOL FLAVOR

- SALEM SPENDING DECREASING (\$51.0MM IN 1988 VS. \$13.8MM IN 1992)
- 40% PRINT/60% OOH
- NATIONAL OOH WITH REGIONAL HEAVY-UP
- 1992 PRINT SCHEDULE ACHIEVED AVERAGE 53/1.8 MONTHLY REACH/FREQUENCY (AS25-54)

7 measurement
we is limited

DORAL MENTHOL/MISTY SLIMS MENTHOL KEY COMPETITORS IN PRICE VALUE SEGMENT

- MISTY SLIMS
 - . LAUNCHED IN 1990
 - . SPENT \$15.2MM IN 1992
 - . 65% PRINT/35% OOH
 - . 73% OF PRINT SUPPORTED MENTHOL
 - . 1992 PRINT SCHEDULE ACHIEVED AVERAGE 53/2.1 MONTHLY REACH/FREQUENCY (AS25-54)
- DORAL
 - . DORAL MENTHOL RECEIVED LITTLE SUPPORT (2% OF '92 PRINT SPENDING)
 - . DORAL ROLLED BACK PRICE AUGUST, '92
 - . SUPPORTED WITH MEDIA
 - . SPENT \$6.3MM IN 3 MONTHS
 - . UTILIZED MAGAZINES/SUPPLEMENTS/OOH
 - . ROLLBACK PRINT SCHEDULE ACHIEVED AVERAGE 74/1.6 REACH/FREQUENCY (AS25-54)

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SALEM 5 YEAR SPENDING HISTORY

MEDIUM	1988		1989		1990		1991		1992	
	(\$MM)	%	(\$MM)	%	(\$MM)	%	(\$MM)	%	(\$MM)	%
PRINT										
MAGAZINES	\$15.6	30%	\$17.1	41%	\$11.8	31%	\$ 5.9	28%	\$ 4.9	36%
ROP	0.7	1	0.0	0	0.2	1	0.0	0	0.1	0
SUPPLEMENTS	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
FSIs	2.4	5	1.9	5	1.5	4	1.7	8	0.3	2
TOTAL PRINT	\$18.7	36%	\$19.0	46%	\$13.5	36%	\$ 7.6	36%	\$ 5.3	38%
OOH										
OUTDOOR	\$33.2	64%	\$22.3	54%	\$23.9	64%	\$13.2	64%	\$ 8.5	62%
TOTAL OOH	\$33.2	64%	\$22.3	54%	\$23.9	64%	\$13.2	64%	\$ 8.5	62%
GRAND TOTAL	\$51.0	100%	\$41.3	100%	\$37.4	100%	\$20.8	100%	\$13.8	100%

SOURCE: 1988-1991 LBCo. COMPETITIVE
1992 PMCo. COMPETITIVE

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Source: <https://www.industrydocuments.ucsf.edu/docs/mhfy0004>

**OUT-OF-HOME COMPETITIVE SPENDING
SALEM - TOTAL YEAR 1992**

**SALEM HAD NATIONAL OUT-OF-HOME COVERAGE WITH HEAVY-UP
SPENDING IN FOLLOWING MARKETS:**

<u>TA/MARKET</u>		<u>TOTAL 1992 SPENDING</u>	<u>% \$</u>	<u>% POP.</u>	<u>INDEX</u>
* 1G0	BUFFALO	\$208,471	2.45%	1.25 %	196
1H0	NEW YORK	\$1,604,040	18.87%	7.61 %	248
* 2A0	BALTIMORE	\$271,000	3.19%	1.14 %	280
* 2E0	CHARLOTTE	\$289,006	3.40%	1.31 %	280
* 2I0	NASHVILLE	\$115,903	1.36%	0.81 %	168
* 2J0	ATLANTA	\$366,302	4.31%	1.49 %	289
* 2K0	BIRMINGHAM	\$94,318	1.11%	1.00 %	111
* 2M0	JACKSONVILLE FL.	\$130,810	1.54%	0.94 %	164
2P0	TAMPA	\$260,928	3.07%	1.61 %	191
* 3A0	ST. LOUIS	\$212,171	2.50%	1.20 %	208
* 3D0	MEMPHIS	\$153,218	1.80%	0.98 %	188
* 3G0	NEW ORLEANS	\$220,947	2.60%	1.07 %	243
3Q0	HOUSTON	\$171,738	2.02%	1.68 %	122
3S0	SAN ANTONIO	\$118,801	1.40%	1.18 %	120
* 4A0	PITTSBURGH	\$226,508	2.66%	1.56 %	171
* 4B0	CLEVELAND	\$584,907	6.88%	1.84 %	447
* 4C0	COLUMBUS	\$128,559	1.51%	1.11 %	138
* 4G0	GRAND RAPIDS	\$107,754	1.27%	1.01 %	128
* 4L0	CHICAGO	\$819,771	7.29%	3.41 %	214
* 4Q0	MILWAUKEE	\$222,667	2.62%	1.12 %	234
TOTAL HEAVY-UP SPENDING		\$8,107,818	71.86%	32.96 %	218
TOTAL NATIONAL SPENDING		\$8,500,098	100.00%	100.00 %	

* ALPINE KEY MARKET

SOURCE: LBCO. OOH 1992 COMPETITIVE

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MISTY SLIMS 5 YEAR SPENDING HISTORY

MEDIUM	1988		1989		1990		1991		1992	
	(\$MM)	%	(\$MM)	%	(\$MM)	%	(\$MM)	%	(\$MM)	%
PRINT										
MAGAZINES	\$0.0	0%	\$0.0	0%	\$0.5	13%	\$ 9.0	61%	\$ 8.8*	58%
ROP	0.0	0	0.0	0	0.0	0	0.1	0	0.0	0
SUPPLEMENTS	0.0	0	0.0	0	0.9	24	1.8	12	1.0	7
FSIs	0.0	0	0.0	0	0.1	3	1.3	9	0.0	0
TOTAL PRINT	\$0.0	0%	\$0.0	0%	\$1.5	40%	\$12.2	82%	\$ 9.8	65%
OOH										
OUTDOOR	\$0.0	0%	\$0.0	0%	\$2.3	60%	\$ 2.5	18%	\$ 5.4	35%
TOTAL OOH	\$0.0	0%	\$0.0	0%	\$2.3	60%	\$ 2.5	18%	\$ 5.4	35%
GRAND TOTAL	\$0.0	0%	\$0.0	0%	\$3.8	100%	\$14.7	100%	\$15.2	100%

* 73% MENTHOL OR REGULAR/MENTHOL

SOURCE: 1988-1991 LBCo. COMPETITIVE
 1992 PMCo. COMPETITIVE

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DORAL 5-YEAR SPENDING HISTORY
\$(MM)

<u>MEDIUM</u>	<u>1988</u>		<u>1989</u>		<u>1990</u>		<u>1991</u>		<u>1992</u>	
	<u>\$(MM)</u>	<u>%</u>	<u>\$(MM)</u>	<u>%</u>	<u>\$(MM)</u>	<u>%</u>	<u>\$(MM)</u>	<u>%</u>	<u>\$(MM)</u>	<u>%</u>
PRINT										
MAGAZINES	\$0.0	0%	\$0.4	17%	\$0.5	0%	\$2.0	100%	\$4.4*	50%
ROP	0.0	100	0.5	22	1.1	100	0.0	0	0.2	2
SUPPLEMENTS	0.0	0	0.0	0	0.0	0	0.0	0	3.6	41
FSIs	<u>0.0</u>	<u>0</u>	<u>0.8</u>	<u>35</u>	<u>0.0</u>	<u>0</u>	<u>0.0</u>	<u>0</u>	<u>0.1</u>	<u>1</u>
TOTAL PRINT	\$0.1	100%	\$1.7	74%	\$1.1	100%	\$2.0	100%	\$8.3	94%
OOH										
OUTDOOR	<u>\$0.0</u>	<u>0%</u>	<u>\$0.6</u>	<u>26%</u>	<u>\$0.0</u>	<u>0%</u>	<u>\$0.0</u>	<u>0%</u>	<u>\$0.5</u>	<u>6%</u>
TOTAL OOH	<u>\$0.0</u>	<u>0%</u>	<u>\$0.6</u>	<u>26%</u>	<u>\$0.0</u>	<u>0%</u>	<u>\$0.0</u>	<u>0%</u>	<u>\$0.5</u>	<u>6%</u>
GRAND TOTAL	\$0.1	0%	\$2.3	100%	\$1.1	100%	\$2.0	100%	\$8.8	100%

* 2% REGULAR/MENTHOL

SOURCE: 1988-1991 LBCo. COMPETITIVE
 1992 PMCo. COMPETITIVE

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1992 DORAL SCHEDULE

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III. MARKETING OBJECTIVES

- CREATE BIG BRAND FEEL THROUGH ADVERTISING
- DEFEND ALPINE FRANCHISE
- REGAIN/CAPTURE SALEM SHARE BEING LOST TO DEEP DISCOUNTS

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IV. MEDIA OBJECTIVES AND STRATEGIES

MEDIA OBJECTIVES

BUILD AWARENESS OF NEW "MOUNTAIN FRESH" ALPINE CAMPAIGN USING VARIETY OF MEDIA TO REACH CURRENT ALPINE AND SALEM SMOKERS

- FRONTLOAD ADVERTISING IN FIRST 3 MONTHS TO BUILD REACH QUICKLY FOLLOWING MEDIA HIATUS
- CONCENTRATE SPENDING IN KEY ALPINE MARKETS

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IV. MEDIA OBJECTIVES AND STRATEGIESMEDIA STRATEGIESAUDIENCE

KEY AUDIENCE AS25-54; 40% MALE/60% FEMALE/MEDIAN AGE 39.5 YRS.

- . MENTHOL SMOKERS SKEW FEMALE (60%)
- . MENTHOL/SALEM YOUNGER THAN ALPINE
- NEED TO REACH YOUNGER SMOKERS TO MAINTAIN FRANCHISE
- . 74% OF USERS FROM AS25-54 VS. ONLY 69% FROM AS35-64
- . ALPINE/MISTY SLIMS LESS ETHNIC
- . HOWEVER MENTHOL/SALEM VERY ETHNIC
- . MISTY SLIMS YOUNGER (36.0 YRS)

MENTHOL SMOKER PROFILES INDEXED TO TOTAL ADULTS

	% TOTAL ADULTS	MENTHOL SMOKERS	ALPINE	SALEM	DORAL MENTHOL	MISTY SLIMS MENTHOL
MEN (%)	48	41	40	39	60	4
WOMEN (%)	52	59	60	61	40	96
LA-24	13	77	46	46	23	69
25-34	24	129	79	113	104	138
35-44	21	143	171	148	167	143
45-54	14	107	136	129	71	114
55-64	12	75	117	92	125	42
65+	17	35	41	53	76	41
WHITE	86	81	97	87	87	107
BLACK	11	209	100	173	182	45
NO COLLEGE	61	95	116	93	90	100
SOME COLLEGE	39	107	74	110	115	100
UNDER 30M	48	106	113	98	117	119
\$30M+	52	94	88	102	85	83
MED. AGE (YRS)	41.1	36.9	41.1	39.7	41.5	36.0

SOURCE: PM TRACKING STUDY 12 MOS. ENDING 12/92

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IV. MEDIA OBJECTIVES AND STRATEGIES

MEDIA STRATEGIES (CONT'D)

SCHEDULING

- INTRODUCE CAMPAIGN ASAP
 - . DECEMBER WEEKLIES/SUPPLEMENTS
 - . DECEMBER MONTHLIES (ON SALE MID NOVEMBER)
 - . DECEMBER OOH
- BUILD REACH QUICKLY
 - . FRONTLOAD ADVERTISING
 - . USE MASS REACH WEEKLIES/SUPPLEMENT
- PROVIDE SUSTAINING SUPPORT TO ENSURE TOP-OF-MIND AWARENESS
 - . SCHEDULE FLIGHTS TO SUPPORT PROMOTIONS (TBD)

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IV. MEDIA OBJECTIVES AND STRATEGIES

MEDIA STRATEGIES (CONT'D)

COMMUNICATION GOALS (PRINT ONLY)

- PROVIDE MEDIA SUPPORT TO BUILD AWARENESS QUICKLY/AID RECALL
- ACHIEVE 80% REACH/3.5 FREQUENCY IN KEY MARKETS
 - . MINIMUM LEVELS FOR INTRODUCTORY CAMPAIGNS
 - . TYPICAL OF NEW PRODUCT LAUNCHES/NEWSWORTHY ANNOUNCEMENTS

MONTHLY COMMUNICATION GOALS (AS25-54)

KEY 39 MARKETS

<u>GOALS</u>	<u>INTRODUCTION</u>			<u>SUSTAINING</u>		
	<u>PRINT</u>	<u>OOH</u>	<u>PRINT/OOH</u>	<u>PRINT</u>	<u>OOH</u>	<u>PRINT/OOH</u>
REACH	80	80	95	70	80	90
FREQUENCY	3.5	20	20	3.0	20	20
# MONTHS	3	2	3	4	2	4

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IV. MEDIA OBJECTIVES AND STRATEGIES

MEDIA STRATEGIES (CONT'D)

GEOGRAPHY

CONCENTRATE LIMITED FUNDS IN KEY GEOGRAPHY

- 72% OF ALPINE VOLUME SOURCED FROM 48% OF POP (150 INDEX)

UTILIZE REGIONAL MEDIA TO SUPPORT KEY ALPINE MARKETS

- SUPPLEMENTS
- OOH

UTILIZE NATIONAL MAGAZINES FOR EFFICIENCY

- PRODUCT AVAILABLE NATIONALLY
- COVERAGE OF KEY ALPINE REGIONS REQUIRES 50%-70% OF MOST MAGAZINES CIRCULATION
 - . MORE COST EFFICIENT TO RUN NATIONALLY
 - . SEVERAL MAGAZINES CHARGE SAME FOR REGIONAL AS NATIONAL INSERTION
 - . POSITIONING RESTRICTED IN REGIONAL EDITIONS (USUALLY BACK OF BOOK)

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ALPINE 1993 KEY 39 MARKETS

TA	MARKET	% US	ALPINE		SALEM	
			% VOL	SDI	% VOL	SDI
1F0	SYRACUSE	0.86 %	1.46 %	89	1.66 %	101
1G0	BUFFALO	1.25	1.77	135	1.27	96
1H0	PHILADELPHIA	2.80	2.81	121	3.53	152
1J0	HARRISBURG*	1.58	3.89	169	3.28	141
2A0	BALTIMORE	1.14	1.91	168	1.80	159
2B0	WASHINGTON D.C.*	1.97	2.24	143	2.43	155
2C0	RICHMOND*	1.80	2.83	189	2.16	139
2D0	RALEIGH/DURHAM	0.97	3.31	211	2.30	147
2E0	CHARLOTTE	1.31	2.60	135	2.55	133
2F0	COLUMBIA	1.01	1.06	131	1.32	163
2G0	GREENVILLE	0.87	0.59	80	0.94	129
2H0	KNOXVILLE	1.05	1.54	92	1.78	106
2J0	NASHVILLE	0.81	0.49	84	0.52	89
2K0	ATLANTA	1.49	3.83	141	3.44	127
2L0	BIRMINGHAM	1.00	2.09	180	1.30	112
2M0	SAVANNAH	0.69	0.85	147	0.74	128
2N0	JACKSONVILLE	0.94	1.02	132	0.80	103
2O0	PENSACOLA	0.96	1.43	141	1.12	111
3A0	ORLANDO	1.45	1.81	72	1.91	76
3B0	ST. LOUIS	1.20	1.63	174	1.56	166
3C0	PADUCAH	0.47	1.60	127	1.27	100
3D0	MEMPHIS	0.96	1.31	96	1.50	110
3E0	JACKSON	0.78	1.69	148	1.27	110
3F0	LITTLE ROCK	0.95	1.19	138	0.83	94
3G0	NEW ORLEANS	1.07	2.03	172	1.48	125
4A0	PITTSBURGH*	1.56	3.62	240	2.00	132
4B0	CLEVELAND*	1.54	2.57	255	1.68	146
4C0	COLUMBUS	1.11	0.88	94	1.10	118
4D0	CINCINNATI	1.32	1.60	68	2.60	111
4E0	SACINAW	0.70	0.40	88	0.40	97
4F0	DETROIT	1.87	2.64	138	2.31	121
4G0	GRAND RAPIDS	1.01	1.36	78	1.62	92
4H0	TOLEDO	0.93	1.67	149	1.60	142
4I0	INDIANAPOLIS	1.14	0.97	79	1.38	113
4L0	CHICAGO	3.41	2.73	104	3.49	132
4M0	PEORIA	0.93	1.23	117	1.12	107
4N0	GREEN BAY	0.71	1.63	272	0.69	115
4O0	MINNEAPOLIS	1.71	1.54	92	1.29	77
4Q0	MILWAUKEE*	1.12	2.61	230	1.55	136
	TOTAL	48.32 %	72.4 %		65.8 %	

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V. PLAN RECOMMENDATION

MAGAZINES

NATIONAL MAGAZINES RECOMMENDED FOR THE FOLLOWING REASONS:

- COVER 100% OF BUSINESS
- COST EFFICIENT
- AUDIENCE SELECTIVITY
- MASS REACH

SELECTION CRITERIA

MAGAZINE SELECTION BASED ON SEVERAL INTERACTIVE CRITERIA (IN ORDER OF PRIORITY)

- EFFICIENCY AGAINST KEY AUDIENCE
 - . EFFICIENT TITLES REQUIRED TO OBTAIN BROAD REACH
- AUDIENCE SELECTIVITY
 - . SELECTED TITLES INDEX HIGH AGAINST AS25-54, ALPINE, SALEM, AND MENTHOL SMOKERS
- COMPETITIVE ADVERTISING
 - . ADVERTISE HEAD-ON WHERE COMPETITORS ARE PRESENT
- COMBINATION OF TITLES SUBJECT TO 40% MALE/60% FEMALE SPLIT; 39.5 MEDIAN AGE

CREATIVE

PAGE 4/COLOR BLEED

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V. PLAN RECOMMENDATIONMAGAZINESSELECTED TITLES

<u>AUDIENCE</u>	<u>CATEGORY</u>	<u>TITLE</u>	<u>AS25-54 SELECTIVITY</u>	<u>AS25-54 CPM</u>
WOMEN'S	TABLOIDS	NATIONAL ENQUIRER	131	\$ 6.81
		STAR	129	10.23
	WOMEN'S SERVICE	BETTER HOMES	96	15.05
		FIRST FOR WOMEN	126	10.93
		MCCALLS	105	15.78
		REDBOOK	109	15.52
		WOMAN'S WORLD	132	6.98
	FASHION	COSMOPOLITAN	111	18.76
	GENERAL INTEREST	SOAP OPERA DIGEST	128	13.91
		TRUE STORY	157	8.70
		WORKING MOTHER	127	34.78
MEN'S	FISHING/HUNTING	FIELD & STREAM	137	18.76
		OUTDOOR LIFE	142	19.33
	GENERAL INTEREST	PLAYBOY	150	25.04
		POPULAR MECHANICS	120	29.67
	SPORTS	INSIDE SPORTS	121	18.09
		SPORTS ILLUS.	118	22.24
DUAL	ENTERTAINMENT	PEOPLE	107	\$13.75
		TV GUIDE	122	8.74
	GENERAL INTEREST	US	122	25.65
		LIFE	117	17.17
		SUPPLEMENTS	PARADE	100
		USA WEEKEND	98	21.36

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V. PLAN RECOMMENDATION

SUPPLEMENTS

SUPPLEMENTS RECOMMENDED REGIONALLY FOR FOLLOWING REASONS

- COST EFFICIENT
- REGIONAL FLEXIBILITY
- MASS REACH IN LINE WITH ALPINE DEMOGRAPHICS
 - . 42 MEDIAN AGE
 - . 48% MALE/52% FEMALE
 - . 100-106 MENTHOL INDICES

CREATIVE

QUEEN SIZE 4/COLOR PAGE

NEWSPAPERS

NEWSPAPERS NOT RECOMMENDED AT THIS TIME

- NOT COST EFFICIENT (\$70-\$85 CPM/3X AVG. MAG. CPM)
- LOW SELECTIVITY (72 SMOKER INDEX)
- SHORT SHELF LIFE

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V. PLAN RECOMMENDATION

OUT-OF-HOME

CAPITALIZE ON OOH DOMINANCE TO INCREASE VISIBILITY OF NEW CAMPAIGN

- MOUNTAIN FRESH CREATIVE WELL SUITED FOR OOH

RECOMMEND MIX OF CORPORATE POOL BULLETINS AND 30-SHEET

- BULLETINS HIGH VISIBILITY/IMPACTFUL (20' X 60' AND 19.5' X 48')

. MAY HAVE CONFLICT WITH MERIT/BASIC FOR DECEMBER CORPORATE POOL

- 30-SHEET MORE EFFICIENT/DEEPER MARKET PENETRATION (12' X 24')

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V. PLAN RECOMMENDATION**OUT-OF-HOME****CONVENIENCE STORES/ONE-SHEET**

RECOMMEND C-STORES/ONE-SHEET IN 6 KEY MARKETS TO SUPPORT KEY
PACK OUTLETS

- C-STORES (61" X 45") PROVIDE GENERAL MARKET COVERAGE
- ONE-SHEET (30" X 46") CONCENTRATED IN ETHNIC AREAS
 - . MENTHOL SMOKERS SKEW ETHNIC (209 INDEX)
- PROVIDE STRONG P.O.P. PRESENCE
 - . ENHANCE/REPLACE TRADE P.O.P. EFFORTS
- BUILD AWARENESS/FREQUENCY
- C-STORES/ONE-SHEETS PROVIDE ESTIMATED 50-60% REACH AND
12-17 FREQUENCY PER MONTH
 - . CPM ESTIMATED AT \$19.00 (AS25-54)
- * DECEMBER AVAILABILITY MAY BE LIMITED DUE TO
COMPETITION WITH OTHER PM BRANDS (VIRGINIA SLIMS,
MERIT)

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VI. PLAN SUMMARYRECOMMENDED PLAN \$16.3MM

NATIONAL MAGAZINES WITH REGIONAL ROP/SUPPS/OOH

BUDGET ALLOCATION

	<u>DEC '93</u>	<u>JAN-NOV '94</u>	<u>TOTAL PLANNED EXPEND. (\$000)</u>	<u>% OF SPENDING</u>
<u>PRINT</u>				
MAGAZINES	\$1,769.7*	\$ 5,742.2	\$ 7,511.9	46%
SUPPS (39 KEY MKTS.)	<u>307.4</u>	<u>645.4</u>	<u>952.8</u>	<u>6</u>
TOTAL PRINT	\$2,077.1	\$ 6,387.6	\$ 8,464.7	52%
<u>OOH</u>				
30-SHEET (KEY 39)	\$1,482.6	\$ 5,115.0	\$ 6,597.6	41
C-STORES (KEY 39)	181.2	543.5	724.7	4
ONE SHEET (KEY 39)	154.1	<u>363.1</u>	<u>484.2</u>	<u>3</u>
TOTAL OOH	\$1,784.9	\$ 6,021.6	\$ 7,806.5	48%
 TOTAL	 \$3,862.0	 \$12,409.2	 \$16,271.2	 100%

* INCLUDES JANUARY MONTHLIES

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VI. PLAN SUMMARY

RECOMMENDED PLAN \$16.3MM

NATIONAL MAGAZINES WITH REGIONAL SUPPS/OOH

SCHEDULING

- INTRODUCE CAMPAIGN IN MID NOVEMBER
 - . DECEMBER MONTHLIES (ON SALE MID NOVEMBER)
 - . NOVEMBER WEEKLIES/SUPPLEMENTS
 - . DECEMBER OOH

	#	INS.	PUBS	<u>MONTHS</u>
MONTHLY MAGAZINES	7		15	DEC/JAN/FEB/APR/MAY/ JUL/SEPT
WEEKLY MAGAZINES	10		6	NOV/DEC/JAN/APR/MAY/ JUL/SEPT
SUPPLEMENTS	3		2	NOV/DEC/JAN
30-SHEET (#50 SHOWING)	4	MOS	-	DEC/JAN/APR/JUL
ONE SHEET	4	MOS	-	DEC/JAN/APR/JUL
C-STORES	4	MOS	-	DEC/JAN/APR/JUL

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VI. PLAN SUMMARYCOMMUNICATION GOAL ANALYSIS39 KEY MARKET MONTHLY REACH/FREQUENCY (AS25-54)

	<u>GOAL</u>	<u>ACTUAL</u>
<u>INTRO (DECEMBER)</u>		
PRINT: MONTHLY	80/3.5	84/3.5
OOH (KEY MARKETS)	80/20.0	87/20.7
COMBINED (KEY MARKETS)	95/20.0	94/22.3
<u>SUSTAINING (APR/MAY/JUL/AUG/OCT)</u>		
PRINT: MONTHLY	70/3.0	69/2.6
OOH (KEY MARKETS)	80/20.0	87/20.7
COMBINED (KEY MARKETS)	90/20.0	93/21.3
% MALE/% FEMALE SPLIT	40/60	40/60
MEDIAN AGE (YRS.)	39.5	37.9

NOTE: NATIONAL R/F IS 75/3.3 DURING INTRO AND 69/2.6 DURING SUSTAINING MONTHS

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VI. PLAN SUMMARYOPTION I: \$14.7MM (\$3.2MM IN DECEMBER)

SAME AS RECOMMENDED PLAN EXCEPT:

- ELIMINATES C-STORES/ONE SHEET
- REDUCES 30-SHEET MARKET LIST TO INCLUDE ONLY LARGEST MARKETS WITHIN TA (DECEMBER ONLY)

BUDGET ALLOCATION

	DEC '93	JAN-NOV '94	TOTAL PLANNED EXPEND. (\$000)	% OF SPENDING
<u>PRINT</u> <i>regional \$570</i>				
MAGAZINES	\$1,769.7*	\$ 5,742.2	\$ 7,511.9	51%
SUPPS (39 KEY MKTS.)	<u>307.4</u>	<u>645.4</u>	<u>952.8</u>	<u>6</u>
TOTAL PRINT	\$2,077.1	\$ 6,387.6	\$ 8,464.7	57%
<u>OOH</u> <i>1st mkt only</i>				
30-SHEET (KEY 39)	\$1,152.6	<i>4,500</i> \$ 5,115.0	\$ 6,267.6	43
C-STORES (KEY 39)	0	0	0	0
ONE SHEET (KEY 39)	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
TOTAL OOH	\$1,152.6	\$ 5,115.0	\$ 6,267.6	43%
TOTAL	\$3,229.7	\$11,502.6	\$14,732.3	100%

* INCLUDES JANUARY MONTHLIES

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